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ABSTRACT

During 1981, a study was conducted to determine whether vocational-technical school district directors and community college presidents in Wisconsin who worked under an appointed board and directors/presidents in other states who worked under an elected board perceived the effectiveness of elected and appointed boards differently. Questionnaires were administered requesting 16 directors/presidents working under appointed boards and 16 directors/presidents working under elected boards to rate the effectiveness of both types of boards in ten areas. These areas were affirmative action; board-administrator relations; budget development and approval processes; educational program development, management, maintenance, and discontinuance; fiscal accountability to taxpayers; local politics; policy development; qualifications and experience of board members; recall of board members; and responsiveness to needs. In general, respondents working under appointed boards were more consistent in their responses than those working under elected boards, and their responses tended to be extremely supportive of the appointment process. They felt that appointed boards were extremely effective in the areas of recall of board members, qualifications and experience of board members, and affirmative action--the same areas in which elected boards were given low ratings by presidents/directors working under these boards. The study report includes a literature review and the survey instrument. (KL)

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COMPARISON OF GOVERNANCE EFFECTIVENESS OF APPOINTED AND ELECTED BOARDS OF EDUCATION/TRUSTEES

BY

Dennis Ladwig
Lakeshore Technical Institute

A PRACTICUM PRESENTED TO NOVA UNIVERSITY IN PARTIAL FULFILLMENT OF THE REQUIREMENTS FOR THE DEGREE OF DOCTOR OF EDUCATION

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ABSTRACT

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Title: Comparison of Governance Effectiveness of Appointed or Elected Boards of Education/Trustees

Institution: Nova University--Practicum Submitted for Governance and Management Seminar

The purpose of this study was to obtain data for making comparisons of the governance effectiveness of appointed and elected boards of education/trustees. The study involved the district directors/presidents of the 16 Wisconsin Vocational, Technical and Adult Education Districts who work under an appointed board and district directors/presidents of 16 comparable (by FTE's) community colleges in Illinois, Iowa, and Michigan who work under an elected board.

A ten-item questionnaire was administered to each of the respondents. Results disclosed there was a positive significant difference in the judgments/opinions regarding governance effectiveness of those district directors/presidents who work under an appointed board as compared to those who work under an elected board. A multivariant analysis of variance yielded mean scores, standard deviations, and overall F scores. Four of the ten items were significant. These items were (1) Qualifications/Experience--Representation; (2) Affirmative Action; (3) Recall of Board Members; and (4) Educational Program Development, Management, Maintenance, and Discontinuance.

The author recommends that the results of the study be shared with the Association of Governing Boards of Universities and Colleges and other interested citizen/taxpayer groups for use in communicating the strengths of the appointed process of selecting board of education/-trustee members.

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INTRODUCTION

The issue of whether an appointed or elected board of education/trustees is more effective in the governance of an educational system continues to be discussed and debated. The debate regarding the governance effectiveness of appointed versus elected boards will continue as opinions vary with the attitudes of the community and the local and state legislative governing bodies.

Review of current literature indicated that governance effectiveness of appointed boards can be good or bad. Literature also indicated that effectiveness of elected boards can be good or bad. Correlation seems to exist between a good board and good community climate as measured by the high degree of community interest and responsiveness, enthusiasm, and pride (Hurwitz:1972:23). Where dissatisfaction exists with the way things are going, interest groups attempt to change the system.

Higher education institutions are faced with the problem of maintaining quality while at the same time facing problems of public accountability, inflation, and limited resources. Sound governance is needed now more than ever at our more than 3,000 postsecondary education institutions, and this cannot be achieved without the help of the individuals who make up our boards of education and trustees (Association of Governing Boards:1980:5).

There are three basic methods of board of education/trustee selection: appointment, election, or by virtue of position (Association of Governing Boards of Universities and Colleges:1980:15-16).

> APPOINTMENT: Gubernatorial appointment with Senate or legislative confirmation is by far the most common trustee selection for publicly supported colleges and universities. An estimated 70 percent to 75 percent of trustees in public four-year colleges and universities are appointed by public officials, most often the governor with the consent of at least one house of the legislature. In 30 states, the governor appoints the trustees to state boards governing public two-year colleges; and in 14 states, local community college trustees are appointed by either the governor or a local governing body.
>
> ELECTION: Public elections occur most frequently in the public two-year college sector. Board of education/trustees may be elected by the citizens of a state or local district, by the legislature, or by some group such as alumni or agriculture or industrial associations. In 20 states, trustees of these institutions are elected by the public in local elections.
>
> BY VIRTUE OF POSITION (EX-OFFICIO): Some state statutes specify certain public officials as trustees by virtue of the office (ex-officio), occasionally with voting privileges.

Each of Wisconsin's 16 vocational, technical, and adult education districts (VTAE) (see appendix A) is governed by an appointed local seven-member board consisting of two employers (management), two employees (labor), two citizens-at-large (public), and a public secondary school district administrator from within the VTAE district. Board members are appointed based upon geographic, demographic, and affirmative action guidelines by an appointment committee consisting of secondary school board presidents or county board chairpersons.

Lakeshore Technical Institute (LTI), one of Wisconsin's 16 vocational, technical, and adult education districts (VTAE), is a vocational, technical institute offering a flexible and varied educational program and related services to the citizens and taxpayers of the two county school district and the state of Wisconsin. LTI offers associate

degree, vocational diploma, and certificate programs as well as a variety of individual adult and continuing educational courses.

A number of interested groups, such as the Wisconsin Public Expenditure Survey (Taxpayers Alliance), the Wisconsin legislature, and individual citizens/taxpayers are interested in changing the present method of selecting board of education members for the 16 Wisconsin Vocational, Technical and Adult Education Districts (VTAE), of which the Lakeshore Technical Institute (LTI) is a part, to that of elected. Proponents of the change give the taxing power of appointed boards as their main concern but have not identified any other reasons for a change in the governance system from an appointed board to that of an elected board. Currently, seven bills are being considered in the Wisconsin legislature which would legislatively change the current district board governance structure. These proposals are generally advanced since the VTAE district board is the only significant quasi-governmental body in Wisconsin able to levy a tax with its board members not being elected by the citizenry at large.

Dennis Nitschke, executive secretary of the East Central Wisconsin VTAE Consortium, prepared a report for the legislative committee of the Wisconsin VTAE Boards Association which stated that the VTAE boards should continue to be appointed. The rationale for his proposal was:

> The VTAE board appointment process is one that has stood the test of time. The statutory provisions setting forth the membership of VTAE boards and the process of involving elected officials (county board chairmen or school board presidents) in the appointment process has ensured the following:
>
> a. Affirmative Action--Women and minorities are represented in significant numbers on VTAE boards.
>
> b. Balanced representation of labor, management, and the general public assures that interests of the community at large

present--geographic and population representation of district residents is assured through representation plans approved by the appointment committees.

c. The VTAE board selection process, although not involving the balloting of all citizens in the district, is one that provides for election by an appointment committee. Under current statutes, this election must be unanimous or the appointment is made by the Wisconsin Board of Vocational, Technical and Adult Education (Legislation Recommendations of Wisconsin's VTAE Districts:1980:16)."

The issue of operating the Lakeshore Technical Institute and the Wisconsin VTAE System under an appointed or elected board of education is important to the operation of the system. A change in the governance system could have effects on program offerings, budget adoption, and long-range planning of LTI and the other 15 Wisconsin VTAE districts.

Statement of the Problem

Factual data relating to governance effectiveness of appointed and elected boards of education/trustees was not available for use in making judgments/opinions regarding the method resulting in the more effective governance of postsecondary technical institutes and community colleges.

Purpose

The purpose of this study was to obtain data for making comparisons of the governance effectiveness of appointed and elected boards of education/trustees.

Research Question

Is there a significant difference in the judgments/opinions regarding governance effectiveness of appointed or elected boards of education/trustees between those district directors/community college

presidents who work under an appointed board and those district directors/community college presidents who work under an elected board?

Research Hypothesis

There is a significant difference in the judgments/opinions regarding governance effectiveness of appointed or elected boards of education/trustees between those district directors/community college presidents who work under an appointed board and those district directors/community college presidents who work under an elected board.

BACKGROUND AND SIGNIFICANCE

Review of Related Literature

Boards of governance have a variety of official names. They are most commonly known as boards of trustees; boards of education; boards of regents, directors, governors; or state boards of higher education. In addressing the Nova University's 1981 Ninth Annual Summer Institute, Lahti (1981) stated that the principle functions of governing boards are:

1. Monitor and assure sound fiscal policy.
2. Regulate educational program and monitor the quality of instruction, research, and student performance.
3. Review the mission statement of the institution.
4. Stimulate and approve long-range plans of the institution.
5. Interpret the community to the college, the college to the community.
6. Act as a buffer to the community.
7. Formally evaluate board performance.
8. Select of the chief executive.
9. Evaluate the chief executive officer.

Many traditions in academic governance based upon conditions of high public trust, high client demand for educational services, high degrees of professionalism, autonomy among academic facilities, and high public resource commitments to postsecondary education are eroding as the nation and the institutions face major changes in social policies, economic conditions, and public expectations. The relationship between the governance boards and the public is decidedly more political (Riley:1978:228).

Related literature reveals that much has been written about ways to choose a community college trustee. However, very little has been written about the personal politics of appointment versus election.

Polk-Lacombe-Goddard (1976:15) stated that:

> The selection of a trustee is a political act, and each actor (appointment authority, voter, trustee, college president) in the process pays a certain price and, we hope, reaps a certain benefit from it. By the cost we mean any detriment, or potential detriment, that an actor may suffer or any obligation or favor an actor may owe as the result of a trustee's being appointed or elected."

Having weighed the pros and cons of each type of selection procedure, the authors reached the conclusion that neither the appointive or elective process was better for all the participants (appointing official, voter, trustee, college president, or member of the college staff). Which method is preferable depends on the perspective of the individual who is analyzing the selection process.

In a 1967 report by the Association of Governing Boards of Universities and Colleges based upon a survey of 67 public junior colleges, the method of becoming a board member was addressed. One question on the survey asked, "How did you come to be a member of the governing board?" The responses were as follows (Wattenbarger:1972:68):

1. Elected by the public as a representative of a political party - 1

2. Elected by the public as nonpartisan candidate - 42

3. Elected by alumni - 0

4. Selected by the board itself - 9

5. Appointed by the president - 2

6. Appointed by the governor or government official - 35

7. Ex-officio member by virtue of some position external to the college - 5

8. Chosen by a church conference, religious order, or some other religious body - 0

9. Other - 6

Related literature reveals that several alternative methods of board of education/trustee selection have been proposed. One such method was proposed by Zoglin (1972:21-23). She stated that election at large from the community has the most advantages for the local community college. Another one which she opposed had a total seven-member board; three board members would be elected, the fourth seat would go to the president/superintendent, and the other three would be appointed to a faculty member, a day student, and an alumnus or evening student, each elected by their peers.

In 1975, Francis C. Pray conducted a study on roles of boards of trustees and chief executive officers in directing policy and in management of public community colleges. Community college systems should provide for a system of generating board members who will minimize political considerations and provide a better balance of talents and concern.

The present practice of public election of many community college boards results in the injection of politics into board

> operation; fails except by occasional happy accident, to give a proper variety of talents and background; and discourages services by many able persons.
>
> It is not a violation of the principles of democracy to substitute a different method than public election for the trustee selection process. No serious fault has been found with the appointment process in this regard. Community college boards might be designed as a mix of a minority of elected members, a majority of appointed members, and perhaps a few others ex-officio and/or elected by the other trustees.
>
> Whatever the method adopted, some system designed to avoid the potential for abuse which exists under the elective system should be considered and tested as an alternative (Pray:1975:32-35).

Lahti (1981) stated that due to the unwillingness of people to run for election to serve on governing boards, the appointed process, with appropriate checks and balances, is the best method of board selection.

Recently, the Association of Governing Boards of Universities and Colleges (AGB) completed a study regarding ways that board of education/trustee selection could be improved. The results of this study indicated the following (Association of Governing Boards of Universities and Colleges:1980:6-16):

> There is an urgent need for a set of guidelines to assist state authorities in identifying and placing the most able people on boards." "Few factors are more important to maintaining vigorous boards and healthy systems of higher education in the nation than the quality and performance of those asked to serve as trustees and regents.
>
> Trustee selection procedures in the public sector have long been criticized for their occasional vulnerabilities to state or political forces. The absence of systematic procedures for selection and opportunities to identify candidates for trusteeship to the governor or other appointing authority by the public has caused many talented men and women to be overlooked as potential board members. Even those board members who are held accountable to a group of voters from the community at large may not have been elected on the basis of carefully considered qualifications.
>
> Two major selection methods, appointment and election, often derive from the political traditions of a state or community. In a few cases, extensive informal screening of candidates precedes the appointment. Often, however, the appointment of a board of education/trustee member is part of the political patronage process. When trustees are elected, political parties sometimes carefully

screen their trustee nominees; but open primaries and contested elections prevail.

In the light of the great diversity of existing methods of selection of public college and university trustees, there is an evident need for general principles and procedures that can be widely applied.

The 18 recommendations of the Association of Governing Boards of Universities and Colleges were developed by the National Commission of College and University Trustee Selection. These 18 recommendations were developed to serve as guidelines to good practice with sensitivity to diverse traditions and with the overall aim of assuring (Association of Governing Boards of Universities and Colleges:1980:16):

1. Trustees of high quality and commitment.
2. Board autonomy to determine institutional policies.
3. Balance and diversity necessary to reflect societal concerns.
4. Legitimacy to make their decision effective.

The AGB commission in its study recognized that there is no single best way to go about the selection of trustees. Governors and other appointing authorities, legislators, and trustees are urged to analyze critically the recommendations to determine their application to the institution's current needs and traditions.

Listed are the 18 recommendations as contained in a report from the National Commission on College and University Trustee Selection (National Commission on College and University Trustee Selection:1980: 19-39).

1. Trustees of public governing boards should be appointed by the governor or other established authority from a list of nominees who have been carefully screened by a special committee.
2. A nominating committee for each institution should be appointed by the governor. It should consist of at least five people; and its composition should take into account

the diversity of the state, region, or local community the institution primarily serves.

3. The nominating committee should have carefully delineated responsibilities. Among these should be:

   a. To assess board membership needs in terms of background, skills, and diversity (ethnic, racial, sexual, age, geographic, social, and political).

   b. To consult with trustees and the chief executive.

   c. To determine which of the basic board responsibilities needs to be stressed in a given appointment and balance this need with the assessment of the board.

   d. To conduct a broad search for qualified candidates.

   e. To screen candidates for nomination including review of trustees eligible for reappointment.

4. The search for qualified candidates should be continuous. It should include four steps:

   a. Identification of the statutory and other qualifications necessary to be a trustee of each particular institution.

   b. Publication of the process (time limits and deadlines) under which the search functions.

   c. A broad call for prospective candidates for nomination including consultation with the president, administrators, faculty, students, and each board member to ascertain membership needs.

   d. Identification of candidates for trusteeship by members of the nominating committee.

5. Qualified candidates should be carefully screened. The screening of candidates should involve at least five steps, as follows:

   a. Analysis of biographical information.

   b. Review of supporting documents provided by nominators.

   c. Identification of a group of finalists whose personal and professional background and sense of commitment can be probed in more detail.

   d. Interview with each of the finalists to, (1) determine their interest and knowledge of the institution and

trusteeship, (2) assess their individual skills, abilities, and personal characteristics to determine how they would benefit the board, and (3) explain the requirements of trusteeship.

e. Preparation of a statement on each person to be recommended specifying the reasons why the person would be a good trustee and what particular board needs would be filled by his or her appointment.

6. The committee should make at least three nominations for each vacancy from which the governor or other appointing official must make the appointment. If none of the nominees is acceptable, the committee should be given an opportunity to consult with the appointing authority to learn why the three nominees are unacceptable and should then submit three more names. Incumbent trustees should continue to serve until their successors are appointed.

7. The state senate should have the opportunity to confirm trustee appointments and should use this opportunity for substantive, nonpartisan review.

8. New trustees should be provided with a systematic and thorough orientation program. The following elements should be included:

   a. Briefing on the obligations and responsibilities of trusteeship.

   b. The opportunity to become more fully acquainted with the institution's missions, plans, problems, weaknesses, and strengths and future prospects.

   c. A tour of the campus including meetings with administrators, faculty, and students.

   d. The opportunity to meet and exchange views with trustees of the institution outside of regular board meetings and, ideally, the opportunity to do the same with trustees of other institutions.

   e. A review of the structure of the board showing how the new trustees' area(s) of expertise and interest fit in.

9. When elected public officials are members of governing boards, they should be ex-officio and without voting privileges. Although the commission is convinced of the potential usefulness and appropriateness of having the views of public officials when boards deliberate, no board should have more than two such officials.

10. Political party affiliation should not be a criteria for appointment.

11. There should be no resident requirements which prevent qualified people from serving on governing boards.

12. Governing boards should have at least nine voting members whose terms should be appropriately staggered.

13. Trustees should be appointed for terms of not more than 6 years and should not serve for more than 12 consecutive years.

14. Students should not be voting members of the governing boards of the institutions in which they are enrolled.

15. Faculty members should not be voting members of the governing boards of the institutions by which they are employed.

16. Governing boards should adopt a code of conduct for trustees which specifies board duties and responsibilities and establishes procedures for dealing with potential conflicts of interest:

    a. The code should specify the duties and responsibilities of the board and its individual members.

    b. The code should include provision for compliance with the conflict of interest policies and disclosure forms developed by the state or the governing board.

    c. Trustees should not participate in discussion or vote on issues where a potential conflict of interest has been identified.

17. In states where trustees are elected by the public, nominating committees as specified in recommendations two through five should be appointed to assure that all candidates on the ballot are highly qualified.

18. Trustee election should be timed to coincide with other local or general elections.

Governance of higher educational institutions, whether by an appointed or elected board of education/trustees, was closely related to the course content of the Nova University Seminar, "Governance and Management." During the 1981 Nova University Ninth Annual Summer

Institute, the subject of appointed/elected boards of education/trustees was part of the lectures and program sessions within the Governance and Management Seminar.

DEFINITION OF TERMS

For the purpose of the study, the following definitions were used:

BOARD OF EDUCATION - Governing board of a public postsecondary institution such as a technical college or technical institute that oversees the governance of the institution.

BOARD OF TRUSTEES - Governing board of two-year community colleges or public postsecondary institutions. Members are commonly called trustees because they are involved in trust relationships.

COLLEGE PRESIDENT/DISTRICT DIRECTOR - The chief executive officer of a community college/technical college-technical institute who reports directly to the board of education/trustees.

EAST CENTRAL WISCONSIN VTAE CONSORTIUM - A consortium made up of the following VTAE districts: Lakeshore Technical Institute, Fox Valley Technical Institute, Northeast Wisconsin Technical Institute, Moraine Park Technical Institute, and North Central Technical Institute. The purpose of the consortium is to coordinate educational activities and services among the member districts.

GOVERNANCE - Governance refers to the system devised by an organization or an institution to formulate policies and procedures which direct the activities and efforts of all within the organization.

LAKESHORE TECHNICAL INSTITUTE (LTI) - One of 16 Wisconsin VTAE districts located 60 miles north of Milwaukee and 70 miles south of Green Bay, Wisconsin, on the shores of Lake Michigan.

VIRTUE OF POSITION (EX-OFFICIO) - By virtue of position held, a member of a board of education/trustee could be a designated public official such as the governor, legislator, or commissioner of a public agency.
WISCONSIN VOCATIONAL, TECHNICAL AND ADULT EDUCATION (VTAE) - The vocational, technical and adult education system of Wisconsin consisting of 16 VTAE districts offering college transfer programs, two-year associate degree, one-year diploma, and comprehensive adult and continuing education programs.

LIMITATIONS OF THE STUDY

The following limitations were made in this study:

1. For the purpose of this study, governance effectiveness of appointed boards of education/trustees will be limited to the boards of education of the 16 Wisconsin VTAE districts currently selected through an appointive process.

2. The governance effectiveness of elected boards of education/trustees of the public two-year colleges will be limited to public two-year community colleges located in the states of Illinois, Iowa, and Michigan. The 16 community colleges were selected based on (1) range of comparable FTE's and (2) willingness to complete a survey.

3. Governance effectiveness in public and private four-year colleges and universities as well as public and private elementary and secondary school districts will not be addressed in this study.

4. Survey respondents will be limited to college presidents/-district directors of public institutions of selected community colleges (Illinois, Iowa, Michigan) and the 16 Wisconsin VTAE districts. Survey responses will be based upon the perception of the respondent and may

not be based on actual experience within one or the other governance structure.

5. Responses to the comments/reasons and other question components of the questionnaire resulted in openendedness which required author interpretation. This made direct comparisons difficult.

ASSUMPTIONS OF THE STUDY

The following assumptions were made concerning this study:

1. The responses obtained through the survey questionnaire were accurate and based upon the judgments/opinions of the college district directors/presidents.

2. Some directors/presidents had no judgments/opinions regarding effectiveness of one type of board because of lack of experience/-acquaintance with that type of board. Therefore, some stratification comparisons could not be made.

PROCEDURES FOR COLLECTING THE DATA

In order to obtain data for making comparisons of governance effectiveness of appointed/elected boards on operations of the Lakeshore Technical Institute and the other VTAE schools in Wisconsin, the following procedures were utilized:

1. A review of literature was conducted to obtain data relating to the governance of appointed and elected boards of education.

2. The interview questionnaire (see appendix B) consisted of questions pertaining to the governance effectiveness of appointed and elected boards of education/trustees for a particular institution. Two types of responses were available for use by respondents. The first was the numerical scale of 1 through 5, with 5 indicating greatest

agreement which was used to rate the relative agreement with each item. A "no opinion" response was provided for those respondents who had no experience working under an appointed or elected board or who did not wish to comment on a particular question. In addition, each respondent was requested to give comments/reasons to substantiate and support the rating given to the individual question. There were questions relating to the subject of governance effectiveness.

3. The directors/presidents of the 16 Wisconsin VTAE districts were surveyed using the interview questionnaire. The interview questionnaire was administered to the 16 directors at their annual summer meeting which was held in July of 1981. Those directors not in attendance were surveyed individually. Directors/presidents of comparable community colleges were selected from those having an elected board of education/trustees based on (1) range of comparable FTE's and (2) willingness to complete a survey. (See Appendix C.) These respondents completed a mailed interview questionnaire.

4. The validity and reliability of the interview questionnaire were accomplished by review of the survey instrument by two Nova University national lecturers (community college presidents) assigned to the governance and management seminar during the 1981 summer program. In addition, the executive secretary of the East Central Wisconsin VTAE Consortium was consulted on the content and design of the individual questions. Modifications were made in accordance with their reactions.

5. The interview questionnaire consisted of questions pertaining to the governance effectiveness of appointed/elected boards of education in the operation of the particular institution. Areas covered pertaining to governance effectiveness consisted of the following:

a. Affirmative action

b. Board/administration relationships

c. Budget development/approval

d. Educational program development, management, maintenance and discontinuance

e. Fiscal accountability/fiscal stewardship to local taxpayers

f. Local politics (patronage)

g. Policy development

h. Qualifications/experience--representation

i. Recall of board members

j. Response to community needs

6. A scale with a ranking of one through five was utilized in the board of education/trustees governance survey.

N	1	2	3	4	5
No Opinion	Great Disagreement		Moderate Agreement		Great Agreement

PROCEDURES FOR TREATING THE DATA

A total score was determined for each participant and for each variable or question. Because of the number of empty cells resulting from a no opinion response from respondents who had no experience working under an appointed or elected board, a comparison was not made of judgments/opinions of those district directors/presidents working under one type of governance system and responding toward the other. These scores were then used as data for a multivariate analysis of variance which yielded mean scores, standard deviations, and overall F scores.

Univariate F's were calculated for each variable to determine which made the greatest contribution to the overall value.

In order to complete this study, the following hypotheses were developed.

Null Hypothesis

There is no significant difference in the judgments/opinions regarding governance effectiveness of appointed or elected boards of education/trustees between those district directors/community college presidents who work under an appointed board and those district directors/community college presidents who work under an elected board.

Alternative Hypothesis

There is a significant difference in the judgments/opinions regarding governance effectiveness of appointed or elected boards of education/trustees between those district directors/community college presidents who work under an appointed board and those district directors/community college presidents who work under an elected board.

A multivariate analysis of variance was used to test the hypothesis. The hypotheses of the study were accepted or rejected on the basis of the .05 level of significance.

RESULTS

The overall F for the multivariate analysis of variance was 5.801. This indicates that there was a significant difference in the judgments/opinions regarding governance effectiveness of appointed or elected boards of education/trustees between those district directors/-community college presidents who work under an appointed board and those

district directors/community college presidents who work under an elected board.

Since the calculated value of F did exceed the critical value of F (overall significance of study was .001), the null hypothesis was rejected and the alternative hypothesis was accepted. There was a significant difference between the judgments/opinions regarding governance effectiveness of those district directors/community college presidents who work under an appointed board as compared to those district directors/community college presidents who work under an elected board of education/trustees.

Univariate F's were calculated for each variable to determine which variables made the greatest contributions to the overall F values. F scores ranged from 43.972 to 0.863.

The survey instrument was designed to incorporate judgments/-opinions in the areas pertaining to governance effectiveness and consisted of the following items:

a. Affirmative Action

b. Board/Administration Relationships

c. Budget Development/Approval

d. Educational Program Development, Management, Maintenance, and Discontinuance

e. Fiscal Accountability/Fiscal Stewardship to Local Taxpayers

f. Local Politics (Patronage)

g. Policy Development

h. Qualfications/Experience--Representation

i. Recall of Board Members

j. Response to Community Needs

The group means and standard deviations for items of governance effectiveness for district directors/community college presidents who work under an appointed board of education are shown in Table 1.

Table 1

Ranking* of Group Means and Standard Deviations of Items Referring to Comparison of Governance Effectiveness of Appointed Boards of Education/Trustees

Items Comparing Governance Effectiveness	Mean (Based on Maximum of 5)	Standard Deviation
Recall of Board Members	4.625	0.619
Qualifications/Experience--Representation	4.625	0.719
Affirmative Action	4.438	0.814
Fiscal Accountability/Fiscal Stewardship to Local Taxpayers	4.375	0.719
Educational Program Development, Management, Maintenance, and Discontinuance	4.375	0.719
Response to Community Needs	4.250	1.000
Policy Development	4.125	0.719
Budget Development/Approval	4.063	0.854
Board/Administration Relationship	4.000	1.033
Local Politics (Patronage)	3.375	1.455

*Based on means of district directors/community college presidents responses

The judgments/opinions concerning governance effectiveness of district directors who work under an appointed board of education/-trustees were relatively high as indicated by the means which ranged from 3.375 to 4.625 (based on a maximum of 5). Governance effectiveness

items (recall of board members, qualification/experience--representation, and affirmative action) were items which were ranked extremely high by district directors/community college presidents who work under an appointed board of education/trustees.

The group means and standard deviations for items of governance effectiveness for district directors/community college presidents who work under an elected board of education are shown in Table 2.

Table 2

Ranking* of Group Means and Standard Deviations of Items Referring to Comparison of Governance Effectiveness of Elected Boards of Education/Trustees

Items Comparing Governance Effectiveness	Mean (Based on Maximum of 5)	Standard Deviation
Fiscal Accountability/Fiscal Stewardship to Local Taxpayers	3.938	1.389
Response to Community Needs	3.688	1.448
Policy Development	3.500	1.265
Budget Development/Approval	3.438	1.315
Board/Administration Relationships	3.375	1.360
Educational Program Development, Management, Maintenance, and Discontinuance	3.125	1.408
Local Politics (Patronage)	2.875	1.586
Recall of Board Members	2.750	1.438
Affirmative Action	2.438	1.153
Qualifications/Experience--Representation	2.313	1.195

*Based on means of district directors/community college presidents responses

The judgments/opinions concerning governance effectiveness of district directors/community college presidents who work under an elected board of education/trustees ranged from 2.313 to 3.938 (based on a maximum of 5).

A summary of group means and standard deviations based on judgments/opinions for both groups of district directors/community college presidents are shown in Table 3.

Governance effectiveness items (Fiscal Accountability/Fiscal Stewardship to Local Taxpayers, Response to Community Needs, and Policy Development) were items which were ranked high by district directors/-community college presidents who work under an elected board of education/trustees. The same items which were ranked low (Recall of Board Members, 2.750; Affirmative Action, 2.438; and Qualifications/Experience--Representation, 2.313) were ranked extremely high by those district directors/community college presidents who work under an appointed board of education.

Standard deviations for three items referring to governance effectiveness having the highest group means for those district directors/community college presidents who were under an appointed board were 0.619, 0.719, and 0.814. Standard deviations for these same three items for those district directors/community college presidents who work under an elected board were 1.438, 1.195, and 1.153.

Table 3

Ranking* of Group Means and Standard Deviations of Items Referring to Comparison of Governance Effectiveness of Appointed and Elected Boards of Education/Trustees

Items Comparing Governance Effectiveness	Mean (Based on Maximum of 5) Appointed	Elected	Standard Deviation Appointed	Elected
Recall of Board Members	4.625	2.750	0.619	1.438
Qualifications/Experience--Representation	4.625	2.313	0.719	1.195
Affirmative Action	4.438	2.438	0.814	1.153
Fiscal Accountability/Fiscal Stewardship to Local Taxpayers	4.375	3.938	0.719	1.389
Educational Program Development, Management, Maintenance and Discontinuance	4.375	3.125	0.719	1.408
Response to Community Needs	4.250	3.688	1.000	1.448
Policy Development	4.125	3.500	0.719	1.265
Budget Development/Approval	4.063	3.438	0.854	1.315
Board/Administration Relationships	4.000	3.375	1.033	1.360
Local Politics (Patronage)	3.375	2.875	1.455	1.586

*Based on means of district directors/community college presidents responses

The calculated overall significance was 0.001 which was significant at the .05 level. Items comparing governance effectiveness that were significant were qualifications/experience--representation (0.001), affirmative action (0.001); recall of board members (0.001); and educational program development, management, maintenance, and discontinuance (0.004).

The levels of significance and F-ratios for each of the items reflecting comparison of governance effectiveness of appointed and elected boards of education/trustees are found in Table 4.

Table 4

Ranking* of Levels of Significance and F-Ratios of Items Referring to Comparison of Governance Effectiveness of Appointed and Elected Boards of Education/Trustees

Items Comparing Governance Effectiveness	Level of Significance	F-Ratio
Qualifications/Experience--Representation	0.001**	43.972
Affirmative Action	0.001**	32.134
Recall of Board Members	0.001**	22.959
Educational Program Development, Management, Maintenance, and Discontinuance	0.004**	10.000
Policy Development	0.096	2.953
Budget Development/Approval	0.121	2.542
Board/Administration Relationships	0.154	2.143
Response to Community Needs	0.211	1.635
Fiscal Accountability/Fiscal Stewardship to Local Taxpayers	0.272	1.252
Local Politics (Patronage)	0.360	0.863

*Based on levels of significance
**Significant governance effectiveness items

DISCUSSION, IMPLICATIONS, AND RECOMMENDATIONS

Discussion

The issue of whether boards of education/trustees should be elected or appointed is one which tends to be based on philosophical beliefs rather than hard, factual data. Proponents of the elected process use the "no taxation without representation" as one argument to defend their beliefs. Proponents of the appointed process point out that there are many examples of decision-making groups in today's governmental operations that are serving the general public well without the full extension of the electoral democracy. (Example: Federal Department of Health and Welfare, State Public Service Commissions, and local property tax assessors.) Boards of education/trustees must be accountable to citizens/taxpayers and students; but it depends on areas of accountability, to whom they are accountable, and not whether they are appointed or elected.

An analysis of the data of this study indicated the judgments/-opinions regarding comparison of governance effectiveness of those district directors/community college presidents who work under an appointed board of education/trustees were significantly different at the .001 level when compared to the judgments/opinions of the district directors/community college presidents who work under an elected board of education/trustees. The judgments/opinions of the district directors/-community college presidents surveyed in this study who worked under an appointed board were extremely supportive of the appointed process as indicated with group means ranging from 4.625 to 3.375 on a 5-point scale.

Those district directors/community college presidents surveyed from community and technical colleges of Illinois, Iowa, and Michigan were selected based on their willingness to complete the survey and range of comparable FTE's to the Wisconsin VTAE system. The means of their judgments/opinions regarding items of governance effectiveness working under an elective board of education/trustees were not as supportive as the district directors/community college presidents who work under an appointed board as evidenced by the lower means which ranged from 3.938 to 2.313 on a 5-point scale.

In general, respondents working under appointed boards were more consistent in their responses than those working under elected boards. The following governance effectiveness were found to be significant in this study. They were: (1) Qualifications/Experience--Representation; (2) Affirmative Action; (3) Recall of Board Members; and (4) Educational Program Development, Management, Maintenance, and Discontinuance. The first two are board of education/trustee concepts generally unique to the appointive process of selecting board of education/trustee members.

Factors influencing the lower standard deviations of the district directors/community college presidents who work under an appointed board may have been due to the level of investigation, study, and public concern of the appointed board structure of the Wisconsin VTAE system. With seven bills currently being considered in the 1981-82 legislative session and pressure of investigative studies from the Wisconsin Public Expenditure Survey, local taxpayers alliances, and other citizens/taxpayers, the district directors/community college presidents of the Wisconsin VTAE system were more aware of the issues of appointive versus elective system of governance.

Implications

The results of this study indicated that the appointive process of selection of board of education/trustee members was significant at the .001 level in the following areas of governance effectiveness:

1. QUALIFICATION/EXPERIENCE--REPRESENTATION allows for a balanced representation of labor, management, and the general public combined with experience in various areas of employment. In addition, the geographic representation background of board member candidates is a factor that is considered by an appointing authority.

2. AFFIRMATIVE ACTION goals sensitive to the distribution of women and minorities for board membership can be established and implemented under the appointive process of selecting board of education/-trustee members.

3. RECALL OF BOARD MEMBERS is a practice that is somewhat difficult under the elective process of selecting board of education/-trustee members. The appointed boards generally are subject to recall by the appointing authority with greater ease than that afforded to board members under the elective process. In the state of Wisconsin, statutory recall procedures for removal of board members are found in section 17.13(1) of the Wisconsin Statutes.

Dr. Dwight E. Davis, district director of the Wisconsin North Central Technical Institute (1981:4) stated that:

> Those involved as appointed Wisconsin VTAE board members would argue that it is not the method by which one obtains a position of public responsibility that determines whether or not a governing body will be accountable. Indeed, it is the policies, attitudes of the individuals, and the manner in which they execute their responsibilities that determines public responsibility. It can be substantiated that the Wisconsin VAE district boards have carried out their management responsibilities in full view of the public and with substantial public support.

Currently there is considerable debate over the selection method of Wisconsin Vocational, Technical and Adult Education district board members. Advocates of the elective process argue that the authority to levy property taxes should be the right of elected officials, not assigned to appointed officials. The appointed boards of education for the 16 Wisconsin VTAE schools by authority granted within the Wisconsin Satutes have the authority to levy tax on taxable property within the district up to 1.50 mills. Although the local appointed district board has the legal responsibility to set the property tax rate, controls do exist which limit their authority. These controls include the following (Prindiville:1981: 9):

1. The setting of Wisconsin Statutes that a Wisconsin VTAE school cannot tax more than 1.5 mills of equalized valuation of the district for operational purposes.
2. Property tax equalization formula which distributes state aid so that property tax rates among the districts are fairly similar.
3. The 9.5 percent cost control mechanism which limits the increase in full-time equivalent student cost to 9.5 percent or less per year.

This study reemphasized research findings that indicate that governance effectiveness of appointed boards can be good or bad and governance effectiveness of elected boards can be good or bad. Where dissatisfaction exists with the way things are going, interest groups attempt to change the system and fail to recognize the overall strengths of either the appointive or the elective process of selecting board of education/trustee members.

Recommendations

Based upon the results of this study, it is recommended that:

1. The results of this study be used as supportive data and background information for submission to (1) the Wisconsin legislature,

(2) Wisconsin Public Expenditure Survey, (3) taxpayers' alliances, (4) interested citizen/taxpayer groups, and (5) to the Wisconsin Board of Vocational, Technical and Adult Education for use in communicating the strengths of the appointed process of selecting board of education/-trustee members.

2. The results of this study be shared with the League of Women Voters of the state of Wisconsin who are currently engaged in a two-year study concerning the governance, financing, and education programs/-facilities of the Wisconsin VTAE system.

3. The results of this study be shared with the Association of Governing Boards of Universities and Colleges (Washington, D.C.) which is interested in gathering research and additional data to assist in improving the overall board of education/trustee selection process.

4. The results of this study be shared with the executive secretary of the East Central Wisconsin VTAE Consortium who has the responsibility to provide data and information to the subcommittees of the Wisconsin legislature currently studying the method of selecting boards of education for the 16 Wisconsin VTAE schools.

5. The results of this study be used to encourage continued research of the appointive and elective process of selecting boards of education/trustees.

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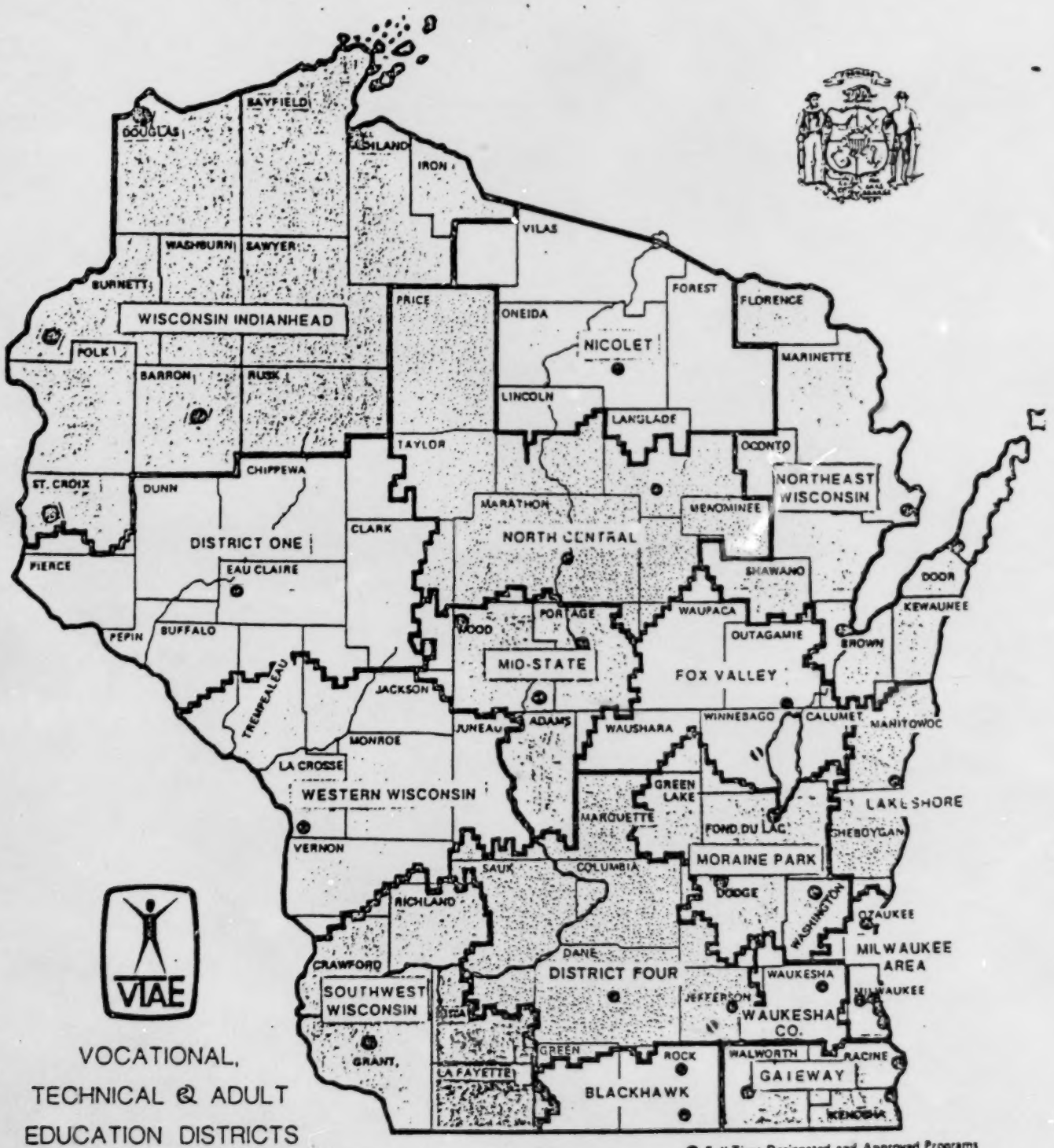
APPENDIX A

State of Wisconsin
BOARD OF VOCATIONAL, TECHNICAL & ADULT EDUCATION



VOCATIONAL, TECHNICAL & ADULT EDUCATION DISTRICTS AND FULL-TIME CAMPUSES

● Full-Time Designated and Approved Programs
○ Other Full-Time and Special Offerings

BOARD OF EDUCATION/TRUSTEES
GOVERNANCE SURVEY

GENERAL INFORMATION

1. Name of community college/VTAE District _____

2. Appointed Board of Education/Trustees ☐
   or
   Elected Board of Education/Trustees ☐
   please indicate

3. Full-time equivalent enrollment (FTE) _____
   1980-81 School Year

4. General Operational Budget (General Fund--1980-81) $_____

☐ Yes, I am interested in receiving a copy of the abstract of your practicum entitled, "Comparison of Governance Effectiveness of Appointed and Elected Boards of Education/Trustees."

Definitions

Governance Effectiveness -

The overall effectiveness of the governance structure of the community college/VTAE District as it pertains to:

1 * Affirmative Action
2 * Board/Administration Relationships
3 * Budget Development/Approval
4 * Educational Program, Development, Management, Maintenance, and Discontinuance
5 * Fiscal Accountability/Fiscal Stewardship to Local Taxpayers
6 * Local Politics (Patronage)
7 * Policy Development
8 * Qualifications, Experience-Representation
9 * Recall of Board Members
10 * Response to Community Need

Appointed Board of Education -

Governing board appointed by governor/county board chairperson or school district board of education president

Elected Board of Trustees -

Governing board elected by the citizens of the community college district

BOARD OF EDUCATION/TRUSTEES
GOVERNANCE SURVEY

Directions: Please answer the following questions pertaining to the Governance Effectiveness of Appointed/Elected Boards of Education/Trustees on each of the following issues, based on your judgment/feeling. A rating scale 1-5 is used where "5" indicates great agreement. The "N" may be used if you have no basis for a judgment/feeling. Your comments/reasons for the ranking and the additional information will also be used to make comparisons and provide additional insights.

	APPOINTED						ELECTED					
	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement
	N	1	2	3	4	5	N	1	2	3	4	5

1. AFFIRMATIVE ACTION

A. I feel that the appointed board of education/trustees enables the school district to effectively meet affirmative action guidelines in the composition of its members. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

B. I feel that the elected board of education/trustees enables the school district to effectively meet affirmative action guidelines in the composition of its members. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

1. Please indicate the total number of board members of your governing body.

_____
Total Number

2. Please indicate the number of women and minority members currently serving on your governing board.

_____ _____
Women Minority Members

	APPOINTED						ELECTED					
	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement
	N	1	2	3	4	5	N	1	2	3	4	5

2. BOARD-ADMINISTRATION RELATIONSHIPS

A. I feel that the appointed board of education/trustees provides for effective Board-Administration Relationships. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

B. I feel that the elected board of education/trustees provides for effective Board-Administration Relationships. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

1. Please indicate the number of years your current board president/chairperson has held this position.

_____
Years

2. What is the maximum number of years that a board member may serve as president/chairperson? _____ If no limit, please indicate. _____

	APPOINTED						ELECTED					
	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement
	N	1	2	3	4	5	N	1	2	3	4	5

3. BUDGET DEVELOPMENT/APPROVAL

A. I feel that the appointed board of education/trustees provides an effective Budget Development/Approval process. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

B. I feel that the elected board of education/trustees provides an effective Budget Development/Approval process. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

1. Please indicate the average number of Board Committee meetings held annually on formulation of the annual budget?

_____

2. Do formal laws and/or board policy exist regarding budget development and approval?

_____ Yes _____ No

	APPOINTED					ELECTED				
	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement
	N	1	2	3	4	5	N	1	2	3	4	5

4. EDUCATIONAL PROGRAM, DEVELOPMENT, MANAGEMENT, MAINTENANCE, AND DISCONTINUANCE

A. I feel that the appointed board of education/trustees provides effective educational program selection and development. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

B. I feel that the elected board of education/trustees provides effective educational program selection and development. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

1. Is board approval required for development and/or discontinuance of an educational program?

_____ Yes _____ No

2. Does your board/committee periodically receive information on evaluation of an ongoing educational program?

_____ Yes _____ No

	APPOINTED						ELECTED					
	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement
	N	1	2	3	4	5	N	1	2	3	4	5

5. FISCAL ACCOUNTABILITY/FISCAL STEWARDSHIP TO LOCAL TAX PAYERS

A. I feel that the appointed board of education/trustees provides effective Fiscal Accountability/Fiscal Stewardship to Local Tax Payers. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

B. I feel that the elected board of education/trustees provides effective Fiscal Accountability/Fiscal Stewardship to Local Tax Payers. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

1. Please indicate average number of individuals testifying at Public Hearing on Budget. _____ Number

2. Please indicate the number of regularly scheduled board meetings (full board--not subcommittees, etc.) held in 1980-81. _____ Number

	APPOINTED						ELECTED					
	N = No Opinion	1 Great Disagreement	2	3 Moderate Agreement	4	5 Great Agreement	N No Opinion	1 Great Disagreement	2	3 Moderate Agreement	4	5 Great Agreement

6. LOCAL POLITICS (PATRONAGE)

A. I feel that the appointive method of selecting board of education/trustees members discourages the impact of local politics (patronage). N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

B. I feel that the elective method of selective board of education/trustees members discourages the impact of local politics (patronage). N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

1. Please indicate if your board has a formal written policy on Board Member Ethics. _____ Yes _____ No

2. Please indicate if your board has a formal written policy on Employee Code of Ethics. _____ Yes _____ No

40

	APPOINTED						ELECTED					
	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement
	N	1	2	3	4	5	N	1	2	3	4	5

7. POLICY DEVELOPMENT

A. I feel that the appointed board of education/trustees encourages effective policy development for the school district. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

B. I feel that the elected board of education/trustees encourages effective policy development for the school district. N 1 2 3 4

Comments/Reasons: _____

_____

_____

1. Does your board have formal written policies? _____ Yes _____ No

2. Does your board have a subcommittee designated for development of formal written policies? _____ Yes _____ No

	APPOINTED						ELECTED					
	N = No Opinion	1 = Great Disagreement	2	3 = Moderate Agreement	4	5 = Great Agreement	N = No Opinion	1 = Great Disagreement	2	3 = Moderate Agreement	4	5 = Great Agreement

8. QUALIFICATIONS AND EXPERIENCE (REPRESENTATION - LABOR, MANAGEMENT, AND GENERAL PUBLIC)

A. I feel that the appointed board of education/trustees method provides for selection of board members with the necessary qualifications, experience, and representation. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

B. I feel that the elected board of education/trustees method provides for selection of board members with the necessary qualifications, experience, and representation. N 1 2 3 4

Comments/Reasons: _____

_____

_____

1. Does your board have representation from management and labor currently serving on the board? _____ Yes _____ No

2. If your answer is yes to question above, please indicate the representation classifications. (management-labor-agriculture, etc.) _____

_____

_____

	APPOINTED						ELECTED					
	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement
	N	1	2	3	4	5	N	1	2	3	4	5
9. RECALL OF BOARD MEMBERS												
A. I feel that the appointed board of education/trustees selection method allows for recall of board members--if necessary.	N	1	2	3	4	5						
Comments/Reasons: _____												
_____												
_____												
B. I feel that the elected board of education/trustees selection method allows for recall of board members--if necessary.							N	1	2	3	4	5
Comments/Reasons: _____												
_____												
_____												

1. In the history of your school district, has an instance occurred when a recall of board member(s) became necessary? _____ Yes _____ No

2. Is there a statutory provision for the recall of board members?

_____ Yes _____ No

	APPOINTED						ELECTED					
	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement	No Opinion	Great Disagreement		Moderate Agreement		Great Agreement
	N	1	2	3	4	5	N	1	2	3	4	5

10. RESPONSE TO COMMUNITY NEEDS

A. I feel that an appointed board of education/trustees responds more effectively to meet community needs. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

B. I feel that the elected board of education/trustees responds more effectively to meet community needs. N 1 2 3 4 5

Comments/Reasons: _____

_____

_____

1. Does your board have a formal written policy on utilization of advisory committees?

_____ Yes _____ No

2. Does the public have an opportunity to speak to issues at any regularly scheduled board of education/trustees meetings?

_____ Yes _____ No

APPENDIX C

Listing of Selected Survey Participants

Wisconsin VTAE Districts	FTE's
Milwaukee Area Technical College	12,786
Madison Area Technical College	6,350
Fox Valley VTAE	4,400
Waukesha County VTAE	4,395
Gateway VTAE	4,350
Northeast Wisconsin VTAE	4,000
Western Wisconsin VTAE	3,750
District One VTAE	3,450
Wisconsin Indianhead VTAE	3,050
Moraine Park VTAE	2,730
North Central VTAE	2,700
Lakeshore VTAE	2,402
Blackhawk VTAE	1,781
Mid-State VTAE	1,650
Southwest VTAE	1,298
Nicolet College and Technical Institute	1,050

Community Colleges/Technical Institutes (Illinois, Iowa, Michigan)	
Oakland Community College, Michigan	13,000
College of Dupage, Illinois	10,760
Des Moines Area Community College, Iowa	8,100
William Rainey Harper College, Illinois	7,814
Delta College, Michigan	6,500
Rock Valley College, Illinois	4,200
Oakton Community College, Illinois	3,596
Iowa Central Community College, Iowa	3,362
Kalamazoo Valley Community College, Michigan	3,100
Elgin Community College, Illinois	3,000
Lakeland College, Illinois	2,950
Hawkeye Institute of Technology, Iowa	2,115
Scott Community College, Iowa	2,000
Kishwaukee Community College, Illinois	1,954
McHenry County College, Illinois	1,550
Bay de Noc Community College, Michigan	1,531

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